BSC Designer

Strategy Execution Software

For video tutorials, please check out web manual at:
https://bscdesigner.com/support

BSC Designer Online - Balanced Scorecard Software

Use BSC Designer Online to create a Balanced Scorecard with KPIs, strategy maps, and dashboards.

Sign-up with a free plan at BSC Designer Online. No credit card is required.

Get start with a template. Use BSC Designer Online to follow the Balanced Scorecard approach using a real template with a strategic objectives and strategy map, not just with some KPIs. Read more...

Below is a review of the most important functions of the BSC Designer.

KPI Management. BSC Designer Online provides all of the means necessary for the management of KPIs. Assign value, baseline, target, add measure units and initiatives. Read more...

Import data for KPI. For the proper usage of the Balanced Scorecard one needs to fill it with fresh data regularly. Import your data from MS Excel or from SQL database. Read more...

Strategy map. Strategy maps give a big picture of where your business is moving. Create strategy maps, put on the strategy map your business objectives. Read more...

Reports. The visualized data gives more insights about possible improvement of the performance. Find a range of charts, diagrams and reports. Read more...

Cascading. Your scorecard has grown? When you need to cascade your Balanced Scorecard, organize the team work with BSC Designer Online. Read more...

Alerts. Need to be informed when someone adds a new action plan, adds a report or when the KPI appears in the red area? Use the alerts function of BSC Designer. Read more...

Share Scorecard. Need to share your Balanced Scorecard with colleagues, partners or show it to the World? Find flexible opportunities to share a scorecard. Read more...

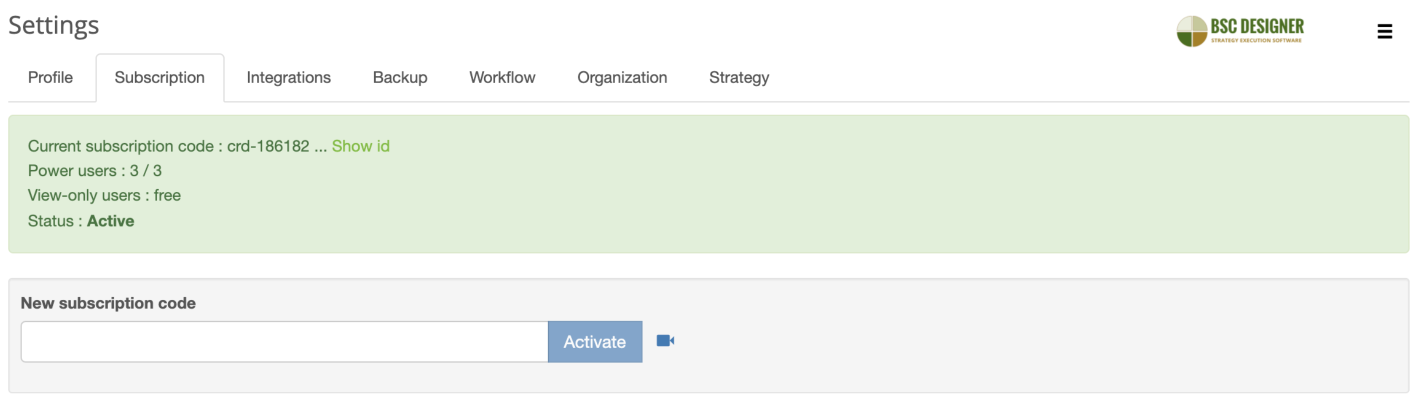
Account Setup in BSC Designer Online

Setup an account in BSC Designer Online, change logo, add currencies for the initiatives, backup and restore data.

Free Plan

Before buying any subscription we do recommend for all users to start with a free plan. For the free plan we don't ask for a credit card details.

Switching to the Paid Account



Once the product was carefully evaluated a user can get a quote and buy a required subscription plan using the online price calculator. The calculator will ask for the required number of power users and preferred billing cycle. Once the order is finalized you will have an activation code. Follow these steps to enter it into BSC Designer Online:

1. Login into your account
2. Click ☰ > **Settings** > **Subscription** tab
3. Copy into the text box the **Credit ID** that you have (it starts with "crd-" and ends with "-kpionline")
4. Click **Activate** button

Account Backup

A security copy of the BSC Designer Online database is created regularly. You might be required by the security regulations of your company to do additional backup copies of your data. Follow these steps to do a backup of your account:

1. Login into BSC Designer Online
2. Go to ☰ > **Settings** > **Backup** tab
3. Select there **Backup scorecards and groups** to backup the data from your account, or **Restore scorecards and groups** to restore from a previously saved backup.

Please note: these additional backups need to be stored locally and are not saved on BSC Designer Online server. Additionally, you might want to turn on the log of user activity in your account.

Workflow

- Use the Workflow tab to define statuses for the initiatives.
- Use the **Historical data** to define a period opened for data input for the users with limited rights.

Organization

On this tab, manage the settings specific for your organization:

- Specify the **name** of the organization
- Define how the **YTD** (Year-to-Date) should be calculated
- Define the start date of a **fiscal year**
- Change the **logo** used in the program interface and for the reports
- Setup **currencies** that can be used for the budgets in the initiative and for the measurement unit of KPIs

The currency marked as a **default** will be used as a base currency for the calculations of the totals in the **cost of strategy** report.

Strategy

Define here the company's strategy statements and strategic themes that will be later used for the strategy maps.

Keyboard Shortcuts

General shortcuts:

N	New item
Control + Z	Undo
Control + Y	Redo
Esc	Close dialog without saving
Enter	Close dialog and apply changes
Shift + D	Delete item

Shortcuts for the **KPIs** tab:

Shift + N	New item on the same level
I	Initiatives dialog
C	Comments dialog
V	Values editor dialog
Control + C	Copy item
Control + V	Paste item

Shortcuts for the **My Scorecards** section:

P	Scorecard properties dialog
S	Scorecard share dialog

Getting Started with an Account

Here are some recommended steps to get started with an account:

- Prepare an organization structure. Learn more...
- Add additional **Power** and **View-only** users. Learn more...
- Create your first scorecard from a template. Learn more...

Once you reviewed main features using example scorecards, try all the functionality on your own:

- Create new KPIs and power them with data. Learn more...
- Automatically build a strategy map. Learn more...

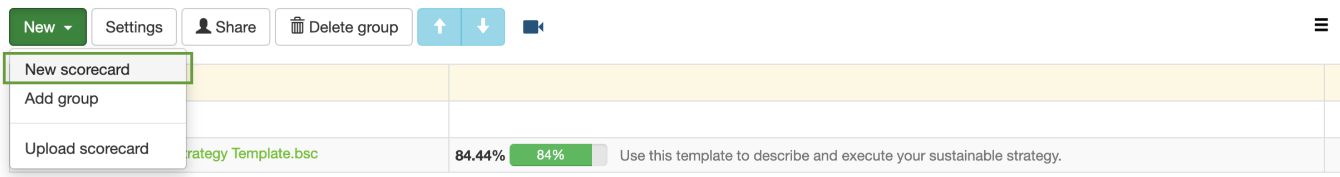
Get Started Using Free Balanced Scorecard Templates

Use free Balanced Scorecard templates available in BSC Designer as a starting point for a new scorecard with KPIs and strategy maps.

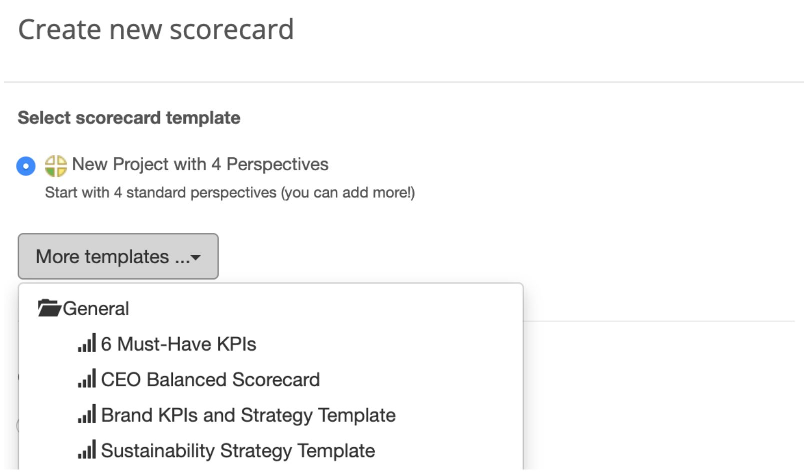
How to Use a Balanced Scorecard Template

Here are the steps to use a Balanced Scorecard template.

1. Log into your account. If you don't have one, create a [free account]
2. Click the **New Scorecard** button



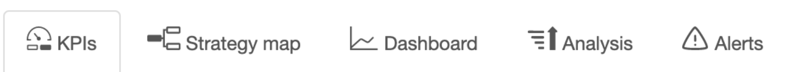
3. Select a template from the **More templates...** list



Review and Customize a Template

The template is now in your account. Now it's time to review what you have and customize it according to your needs.

1. Go to ☰ > **My Scorecards** section and click on the scorecard to open it, wait until BSC Designer Online loads all the data
2. You will see the interface of BSC Designer Online and its main toolbar:



3. Click on the **KPIs** tab to review the KPIs that exist in the scorecard; with this tab you can:
   - Modify existing KPIs or create new ones
   - Enter performance data into the KPIs
   - Align initiatives with KPIs
   - Create a link to the KPIs in other scorecards
   - Learn more about [working with KPIs].

4. Finally, switch to the **Strategy map** tab, here:
   - You can see a "big picture" of your business strategy

- Business goals, KPIs, initiatives, and the cause-and-effect logic is represented visually
- Learn more about working with Strategy Maps.

The scorecard is ready, feel free to add more KPIs, business goals, build your own dashboard, or set up alerts. Check out "Get Started" in the user manual for more information.

Organize Your Scorecards into the Folder Structure

Organize scorecards using folders, create a new scorecard, change its description, share it with colleagues.

In the organization structure one can:

- Create and manage organizational groups
- Create and manage scorecards
- Use **Share** function to assign user rights
- See the performance charts for the root KPIs

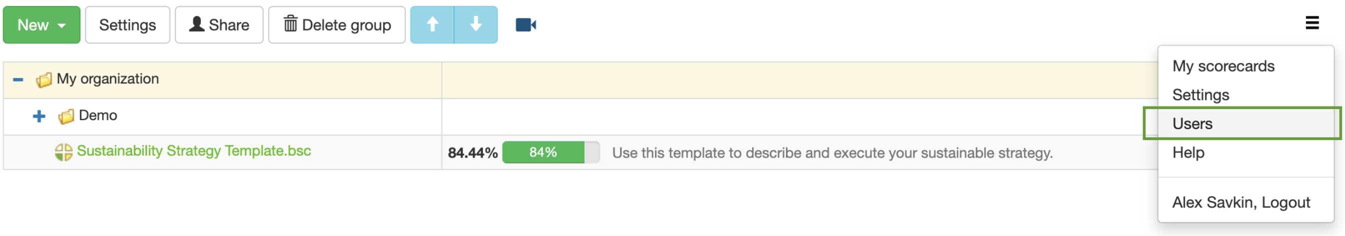
Manage Power and View-Only Users in BSC Designer Online

Involve members of your team in strategy planning and execution. Learn the difference between Power and View-only users.

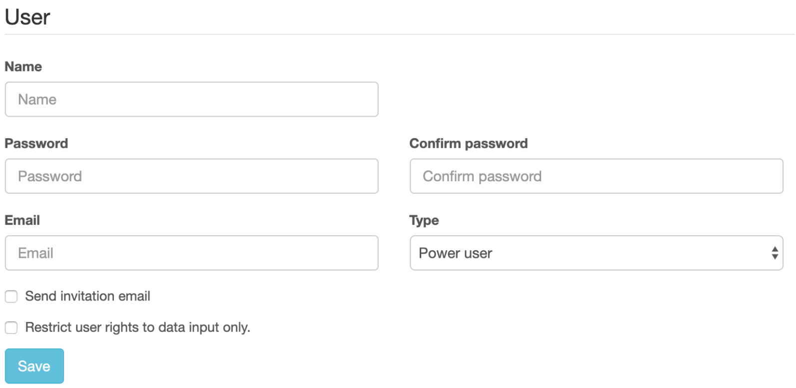
Adding Users

To add additional users to an account:

1. Go to the ☰ > **Users** section



2. Click the **Add user** button
3. Enter required details:



4. Press **Save** button

Alternatively, send out the **Invite link** to the users so that they can self-register under their company's account.

Power and View-only Users

An administrator can add additional **Power** or **View-Only** users to the BSC Designer account:

- **Power** users can access and modify scorecards, enter new data into KPIs, while
- **View-Only** users can only view data that was already entered by other users and access dashboards and strategy maps that already exist in the scorecard.

The number of power users depends on the subscription that was bought. Check out the number of power users allowed in your account in **Subscription** section.

User Rights

An account administrator can adjust access rights of the power users using additional options:

- **Restrict user rights to data input only** (power user will be able to change the **Value** field of the indicator only)
- **Allow change of the historical values** (more settings available via ☰ > Settings > Workflow > Historical data)

Access rights can be further customized using Sharing function.

User Logs

Security regulations in some companies require the software to log the activity of all users. BSC Designer Online allows the administrator to turn logging function on:

1. Go to the **Users** section
2. Click the **Logs** button
3. Click the **Settings** button
4. Select events that you need to log and click **Enable logs**
5. The logs will be displayed in the **Logs section**

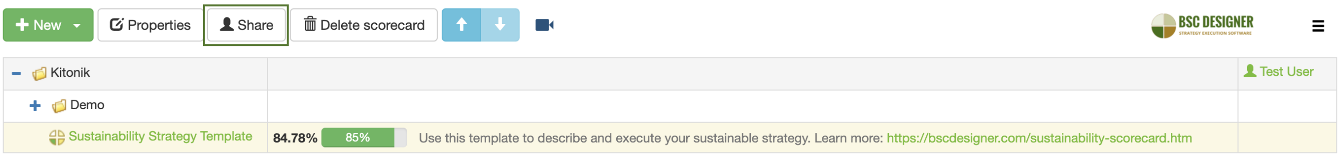
Giving Access Permissions to the Scorecards and KPIs

Share scorecards with your team. Give access to the selected groups, whole scorecards, or specific indicators.

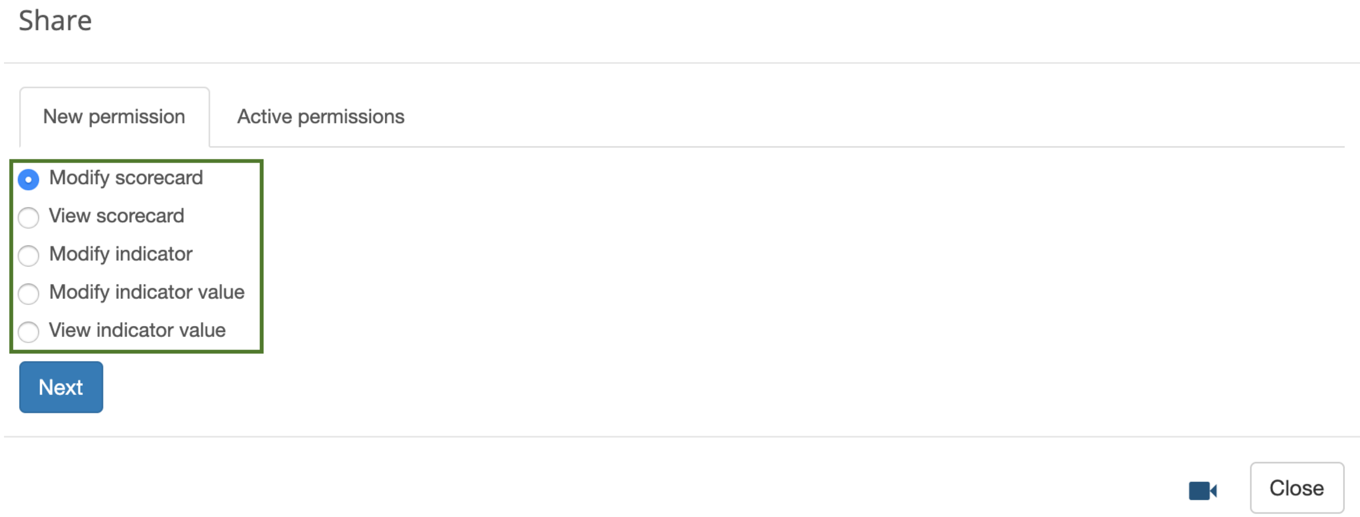
Adding Access Rights

Follow these steps to give a user a new access rights.

1. Go to the ☰ > **My Scorecards**
2. Select the group or the scorecard that you want to work with
3. Click on the **Share** button on the toolbar:



4. On the **Share** page select the rights that you want to assign to the user and click on the **Next** button.



5. Find the user that you want to work with. Next to the user's name find the type of access that you want to give to the user and click on the **Grant** button.

Users who have access to this scorecard will now see it in their account in an organizational structure.

Revoke Access Rights

To revoke access rights follow the steps 1-3 as described above.

1. Go to the **Active permissions** tab
2. Next to the user's name press the **Revoke** button

Public Access

With BSC Designer Online you can make a public scorecard. To give public access on the step 5 find **Public user** and give that user required rights.

Access by Email

In some cases you might want to give an access to the person who is registered with BSC Designer Online, but is not linked to your account. In this case on the step 5 use section **Grant rights for email**, and specify the email of the person.

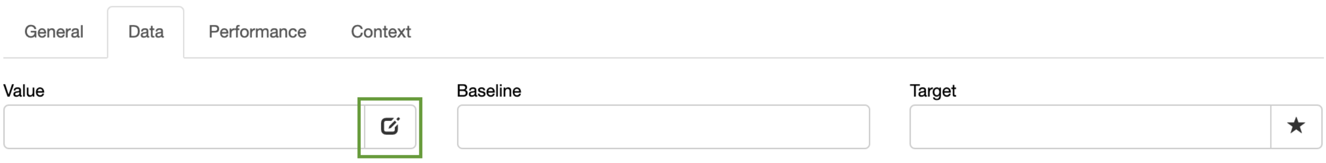
Scorecards Cascading or Alignment in BSC Designer Online

Connect goals and KPIs from different scorecards. Learn how to align goals with each other.

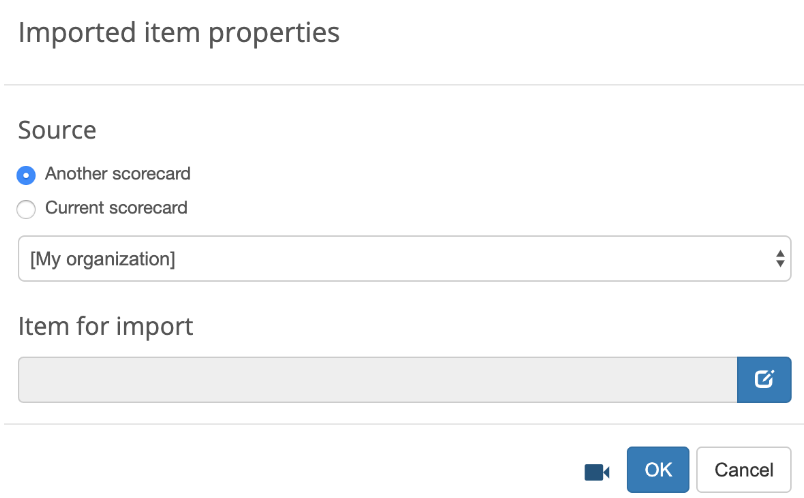
Learn more about the role of [cascading in strategic planning].

Make sure you have two scorecards (**Recipient** and **Source**) in your account and those scorecards have some KPIs. Find below the steps needed to link two scorecards:

1. Open **Recipient** scorecard, go to the **KPIs** tab
2. Select an indicator that will be a recipient of data
3. Switch to the **Data** tab, click on the **Data source** button next to the **Value** field:



4. Click on the **Another scorecard** button in the **More data sources** section
5. In the **Source document** drop list select **Source** document:



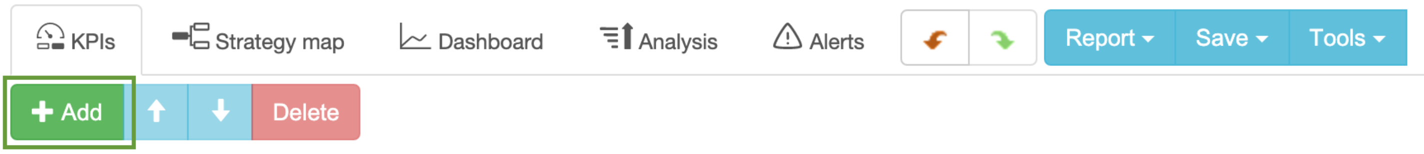
6. In the **Item for Import** drop list select a KPI that you want to link to
7. Click **OK** to close the dialog. The value of the recipient indicator will be linked to the value of the **Source** scorecard

Managing Key Performance Indicators (KPIs) in BSC Designer

Create new KPIs, adjust their settings, input KPI data, specify measurement scale, and optimization function.

For more information about KPIs, check out this article.

Creating a New KPI



1. Select an indicator that will be a container for a new KPI
2. Use **Add** button

Manual Data Entry

To enter data manually follow these steps:

1. Select or create any indicator
2. If needed change an update interval
3. Select appropriate date in the calendar
4. Enter a new numeric value into the **Value** field

Alternatively, you can select any indicator and click onto the **Values Editor** button on the toolbar.

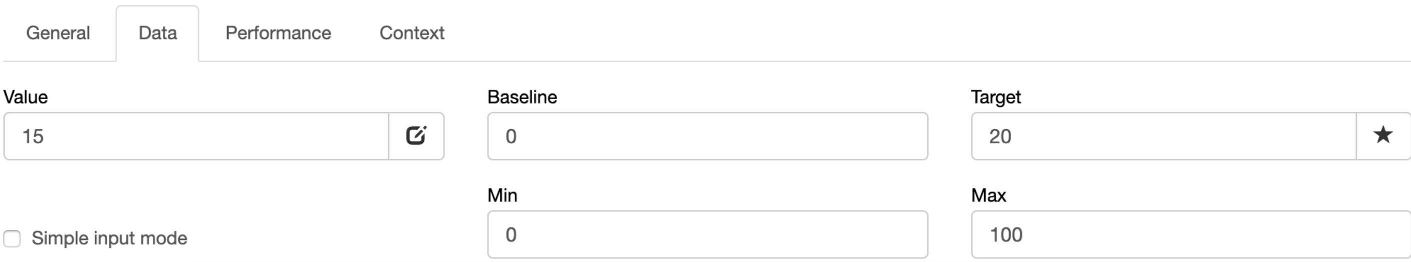
The Properties of an Indicator

Select any indicator in the list of KPIs. The software will display properties of the indicator below.

General Tab

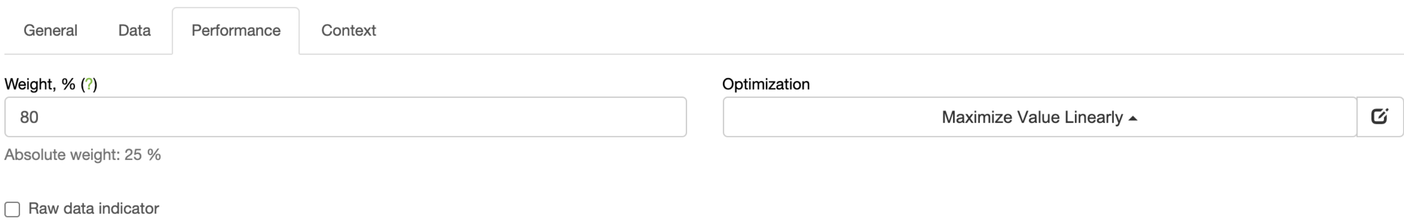
- **Name.** The name of the KPI. Try to keep it short and meaningful, don't overload it with details, and put the details into the description field.
- **Icon.** Next to the **Name** field there is KPI's icon. You can change it by clicking on the icon image.
- **Description.** The description field is for additional information about the KPI; it might be information about the measurement method.
- **Measure.** Use this list to choose one of measurement units that is applicable to the KPI. If there is no measure that fits your needs click the button on the right from the **Measure** drop list to add a new measure.
- **Owner.** The users responsible for this business goal or indicator.

Data Tab

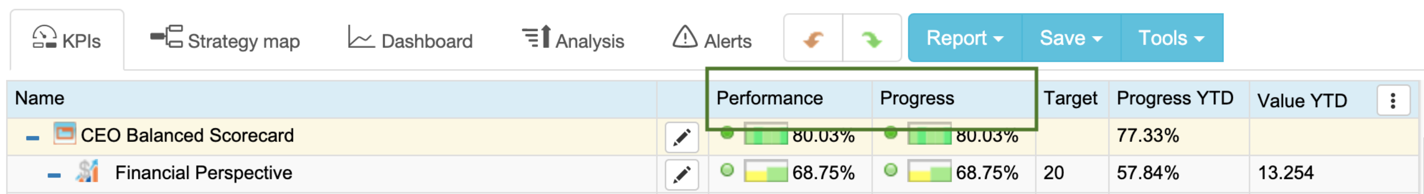


- **Value.** The value field displays the current value of the KPI for the date selected in the calendar. The button next to the "Value" field allows to create indicators with custom formulas.
- **Max** and **Min** values determine the minimum and maximum possible range for a value. Whereas **baseline** and **target** values show your working interval. Normally a baseline is a starting value and the target is a value that you wish to achieve.
- **Simple input mode.** For some indicators the Baseline is always equal to Min value and the Target is always equal to Max value. Check this checkbox and the software will show only the baseline and target fields.

Performance Tab

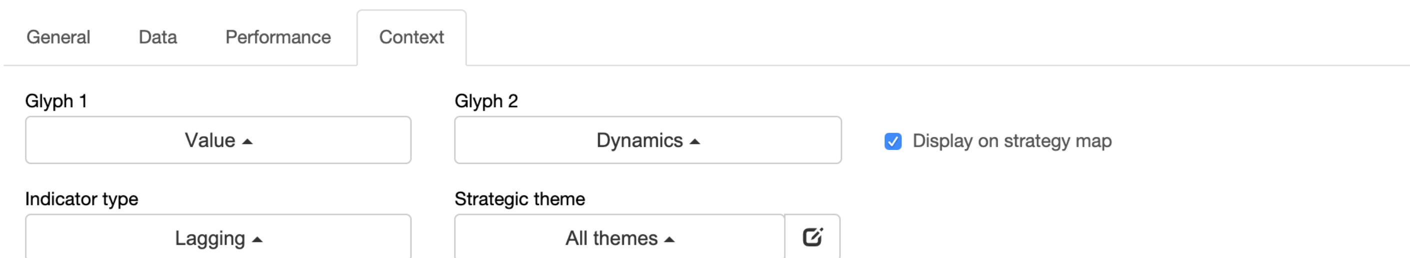


- **Weight, %.** The **relative weight** of the indicator shows how this indicator is important compared to other indicators in the same container. The **absolute weight** shows how this indicator is important compared to all indicators in the scorecard. The weight is taken into account when the **performance** of the container is calculated. Learn more about indicator's weight.
- **Optimization.** What do you want to do with the value of a KPI? Would you like to minimize it (for example like a turnover of employees in a company) or you'd like to maximize it (for example profit value). Choose the appropriate optimization. If the dependency is not as simple as just a line function, you can enter a custom formula into BSC Designer Online that the program will use to calculate your performance and progress. To do this, click on the **Edit** button next to the **Optimization** drop list.
- **Raw data indicator.** Some indicators on the scorecard are just data storages that are not supposed to have a performance or progress. Check this checkbox and BSC Designer won't take this indicator into account when calculating the performance of the scorecard.



Respectively to the max/min pair the **performance** of the KPI is calculated using the formula: Performance = (Value - mn) / (mx - mn). Respectively to the baselines/target pair the progress of the KPI is calculated: Progress = (Value - Baseline) / (Target - Baseline).

Context Tab

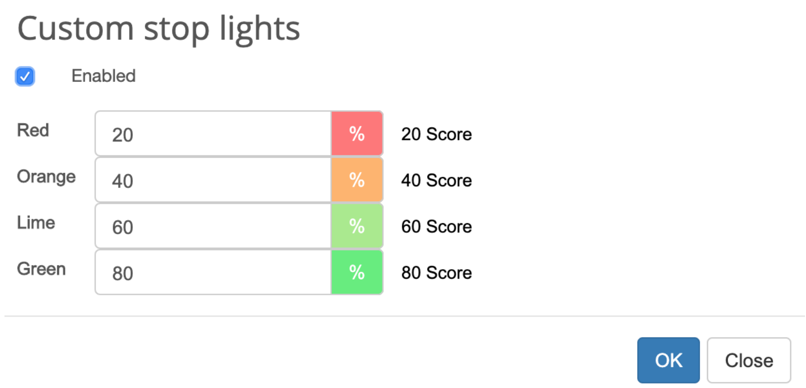


- **Indicator type.** The type of indicator is defined in the context of its container. **Lagging** indicators contribute to the calculation of higher level items. **Leading** indicators are used for local calculations only.
- **Glyph 1** and **Glyph 2.** Glyph settings for the indicator on the strategy map.
- **Strategic theme**. Select a strategic theme for the item.

Stop-Lights

Stop-lights are cycles of different colors that are displayed next to the performance and progress values. The stop-lights help to quickly identify the state of the indicators. Stop-light colors can be customized for an indicator:

1. Open a scorecard in BSC Designer Online
2. Go to the KPIs tab and select an indicator
3. Select **Stop-lights** settings in **Tools** menu
4. Enter new values for the stop-lights, check the **Enabled** checkbox and click **OK**:



Managing Goals or Containers for KPIs in BSC Designer Online

Create business goals (or containers for the KPIs), adjust their settings, quantify them with leading and lagging indicators.

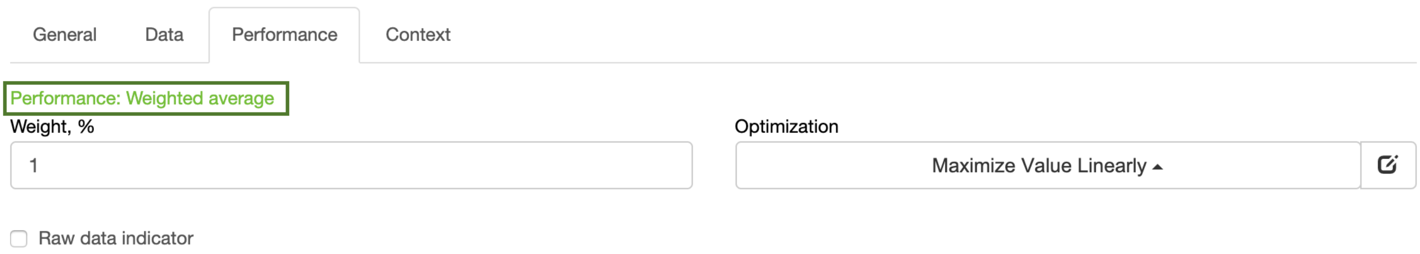
Creating Containers

To create a container:

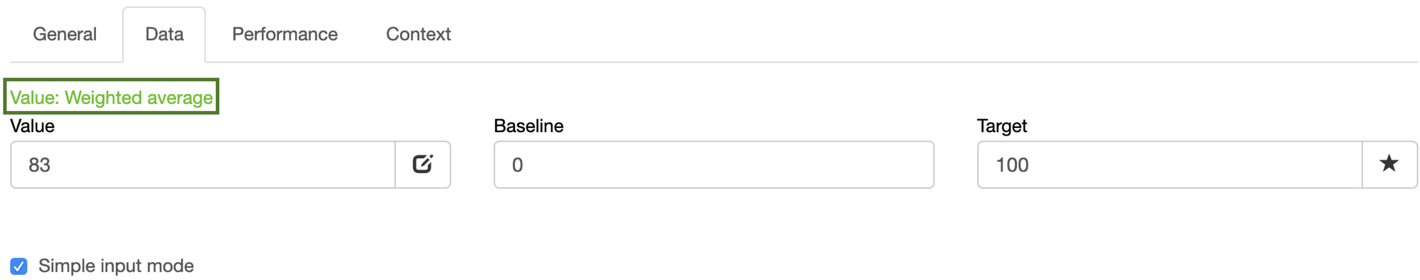
- Select an indicator and create a new indicator inside using the **Add** button on the toolbar. The selected indicator will become a container.
- Drag and drop to place any existing indicator into another indicator, and the target indicator will become a container.

Container Settings

Choose any container indicator to display its properties. Most of the settings will be exactly the same as for the KPI, but there are two properties specific for a container:



- **Performance** - use this property to tell the software how the "Performance" of the container should be calculated.



- **Value** - use this property to tell the software how the "Value" of the container should be calculated.

The following options are available for the "Performance:"

- **Weighted average** - the performance of the container will be calculated as an average of the performance values of the contained KPIs taking into account their weight.
- **Average** - the performance of the container will be calculated as an average of the performance values of the contained KPIs
- **Max, Min** - the software will find the max (or min) performance of the contained KPIs and will use it for the performance of the container
- **Sum** - the performance of the container will be calculated as a sum of the performance values of the contained KPIs
- **Self-standing** - the performance values of the contained indicators won't be taken into account; the performance of the container will be calculated using its own value, min, and max values

The following options are available for the "Value":

- **Weighted average** - the value of the container will be calculated as an average of the values of the contained KPIs taking into account their weight.

- **Average** - the value of the container will be calculated as an average of the values of the contained KPIs
- **Max, Min** - the software will find the max (or min) value of the contained KPIs and will use it for the value of the container
- **Sum** - the value of the container will be calculated as a sum of the values of the contained KPIs
- **Self-standing** - the values of the contained indicators won't be taken into account; the value of the container will be entered manually by user
- **Performance** - the software will use the performance of the container for its value field

Initiatives for the KPIs and Business Goals

Learn how to align initiatives (action plans), persons responsible, budgets with KPIs and business goals in BSC Designer Online.

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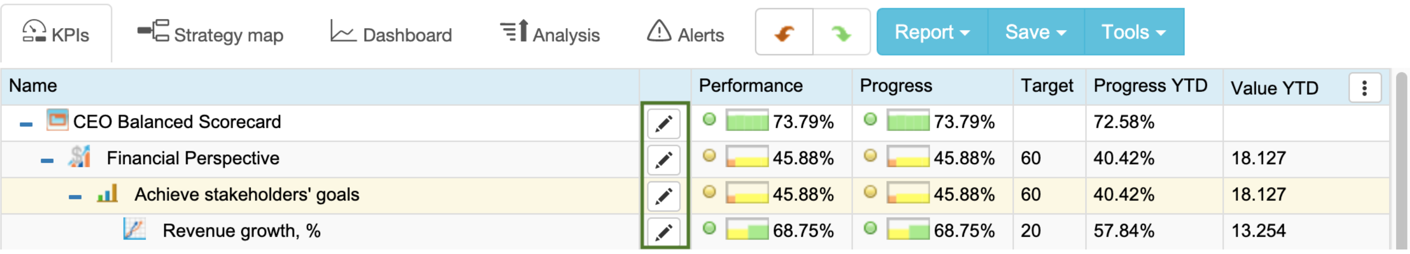
Initiatives



In the list of KPIs, there is a column **Initiatives**. Click on the button in this column to access initiatives for the KPI.

Learn more about the role of the initiatives in strategic planning.

Initiatives have the following properties:

- **Name** of the initiative.
- **Description** of the initiative.
- **Document list** with the links to the detailed action plans.
- **Owner** of the initiative.
- **Type** of the item, such as "initiative", "success factor", "expected outcome", "rationale", or "hypothesis."

Process-related properties:

- **Status** of the initiative (statuses can be configured on the **Workflow** tab in the account Settings).
- **Aligned KPI** that indicates the progress of the initiative.
- **Timeline** for the initiative (is used on dashboard charts).

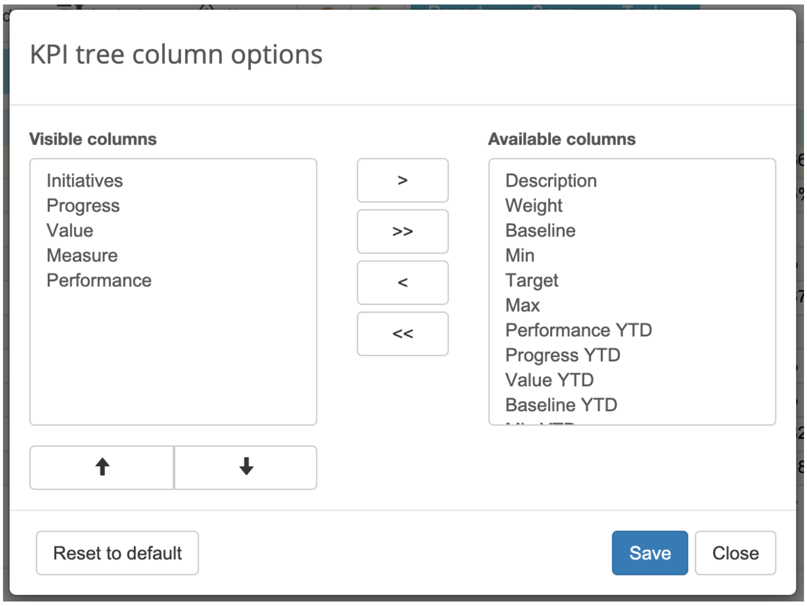
Budget properties:

- **Budget** assigned to the initiative.
- **Currency** of the budget (currencies can be configured on the **Organization** > **Currencies** tab in the account Settings).
- **Actual** expense.
- **Variance** (the difference) between the budget and the actual.
- **Duration** of the initiative.

Advanced KPIs Properties in BSC Designer Online

Use advanced functions for KPIs: specify update interval, define values grouping, change value inheritance and stop-lights properties.

Customize Columns of KPI Table



Use the **Columns** setting in BSC Designer to customize columns of the KPI table according to your needs.

1. Open any scorecard
2. Select the **Columns** command in the **Tools** menu
3. Select columns to display

Update Interval

For any KPI on the scorecard an update interval can be adjusted:

1. Select a KPI
2. Click Values Editor
3. Find **Update interval type** settings:
4. Select required update interval and click **OK**

Practical tips:

- In the **Update Interval** dialog you can use the **Select indicators** option to change update interval for many indicators at once.
- It is possible to change the update interval that the software uses by default for the new indicators, do this via menu **Tools** > **Options** > **Default KPI update interval**

Value Inheritance

Value inheritance defines whether the software will use previous values for the new dates, or if it will use only entered values.

For example: there is a value of 21% for a KPI for September 1. Then user selects September 5th in the calendar.

- If the **inheritance is active** the software will display 21% as a value for September 5, and will calculate the performance;
- If the **inheritance is disabled** the software won't display any data for September 5, and won't calculate the performance;

To adjust inheritance settings:

- For specific indicators: select an indicator, click onto the **Values Editor** button on the toolbar, use the **Values inheritance** option.
- For global settings: select **Values inheritance** in **Tools** > **Options** menu.

Data Grouping

BSC Designer allows grouping data by time periods.

The way the software groups the data is defined individually for each indicator via the **Group by** option. To adjust the **Group by** option:

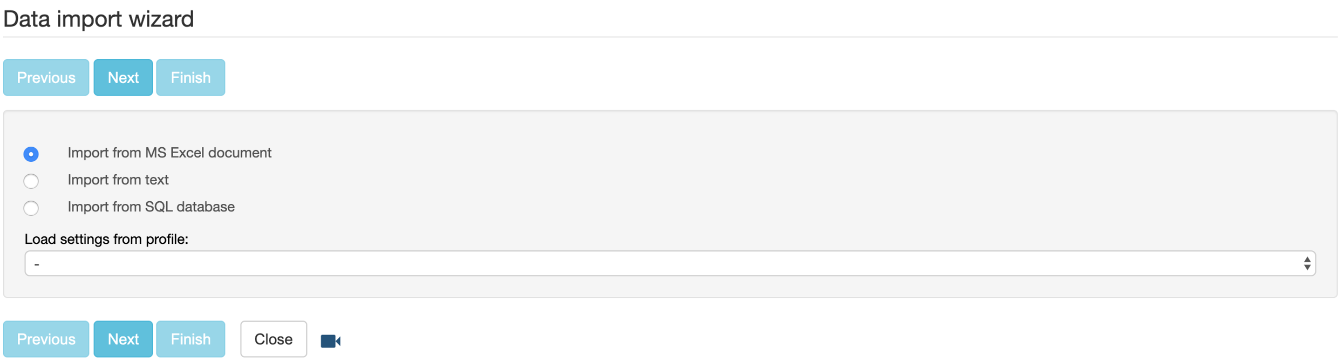
1. Select an indicator
2. Click onto the **Values Editor** button on the toolbar
3. Use the **Group by** drop list.

Importing Data into the Scorecard from Excel Spreadsheet

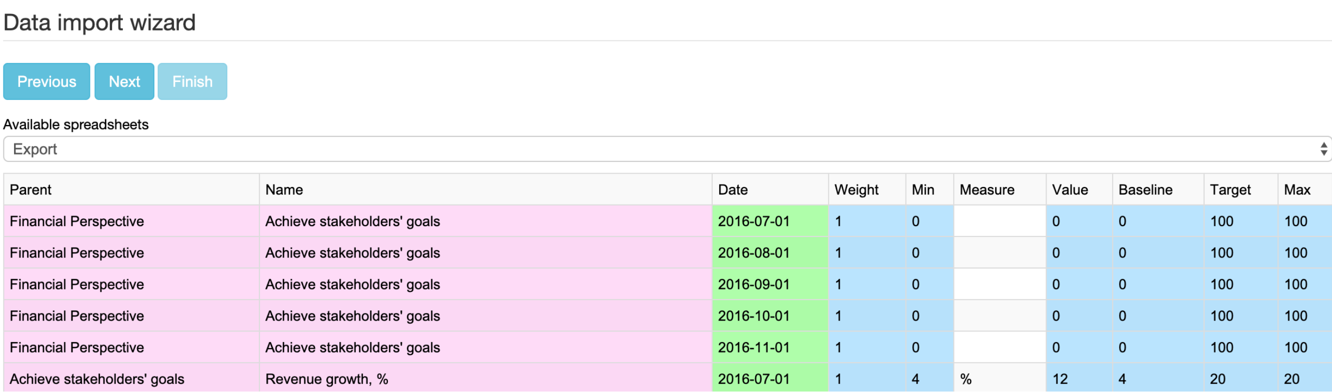
Learn how to import the performance data for KPIs into a scorecard. Learn to use importing profiles.

Import from MS Excel Spreadsheet

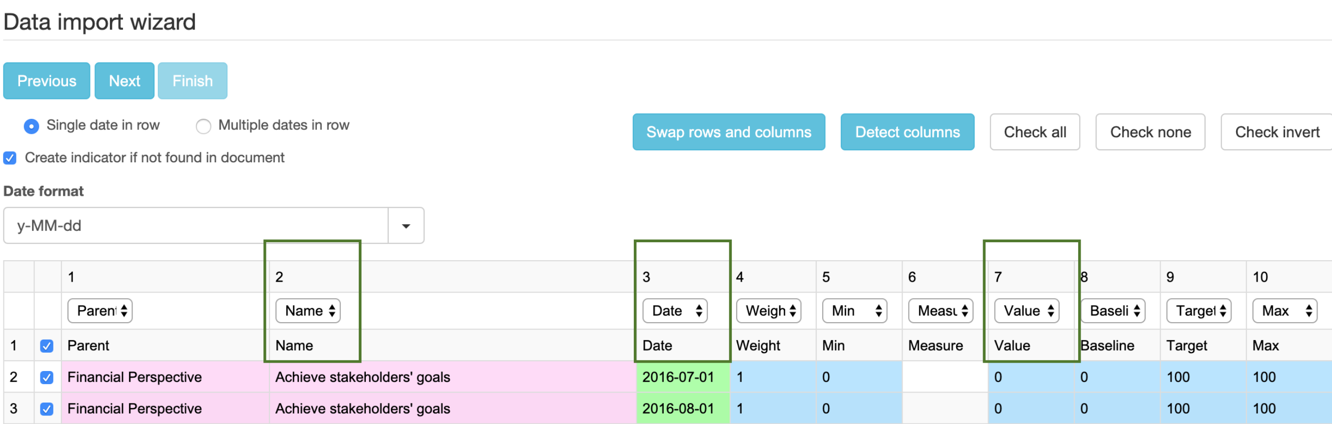
1. Go to your account in BSC Designer Online. Open a scorecard where you want to import some data.
2. Go to the **KPIs** tab.
3. Click on the **Tools** menu, select **Import Indicator Values** option.
4. Select **Import from MS Excel document**. Optional: reuse previously saved import profiles from the **Load settings from profile:** drop list.
5. Click the **Next** button.



6. Upload MS Excel file. You can use this example Excel project.
7. BSC Designer reads the file and shows the list of available spreadsheets. Choose a spreadsheet from the list and click the **Next** button.



8. On the next step mark the column that contains values, the column that contains dates, the column that contains target values (if any), and so on.



9. Click the **Next** button to preview the results.
10. To reuse this import profile later check the **Save settings as ...** check box. Click the **Finish** button to finalize data import.

Troubleshooting

- **Date is not recognized.** Dates might be represented in PC using different formats like yyyy-MM-dd (2016-10-23) or dd MMM yy (23 Oct 16). BSC Designer is able to recognize most formats, but sometimes you might need to specify date format manually. To do this use the "Date format" drop list. Use one of predefined formats; advanced users might want to define their own format (format guidance).
- **I'm using import profile and the data is not correct.** Most likely you have updated the structure of your Excel Spreadsheet, so BSC Designer cannot recognize columns and rows according to the information saved in a profile. Do a manual import once again and create a new import profile.
- **I see data on preview step but I don't see it on KPIs tab.** If the data was displayed correctly on the "preview" step it means that BSC Designer has recognized the data and its formats. Make sure that when you are searching for the data on KPIs tab and that you choose a correct KPI and a correct date in the calendar.

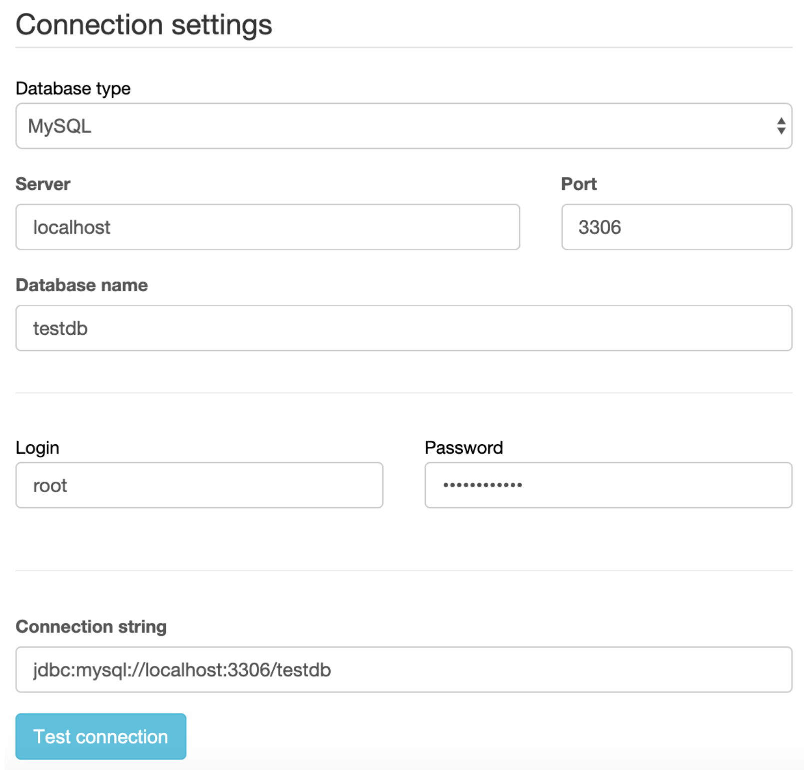
Using SQL Database as a Data Source for the Indicators

Use an external database as a data source for your KPIs. Setup SQL Indicators to access remote database.

Setup SQL Indicator

1. Open a scorecard, go to the **KPIs** tab
2. Select an indicator that will be a recipient of data
3. Switch to the **Data** tab, click on the **Data source** button next to the **Value** field

4. Click on the **SQL Query** button in the **More data sources** section
5. Enter **server** name. For a locally installed BSC Designer the server name will most likely be **localhost**
6. Enter **port** number. For a locally installed MySQL database the default port number is 3306.



7. Enter database name, access login, and password. Click the **Next** button.
8. Formulate required SQL query (see some examples below).
9. Click on the **Next** button to preview the results. Click on the **Finish** button.

Examples of SQL Queries

BSC Designer expects to receive one value as a response to the SQL query. The received data will be used for the **Value** field of the indicator.

Supported parameters:

- **%%UpdatePeriodStart%%** and **%%UpdatePeriodEnd%%** - respective starting date of the update interval and ending date
- **%%ItemName%%** - the name of the KPI as specified in the **Name** field
- **%%date%%** - current date selected in the calendar in BSC Designer

Case 1: Indicator is updated daily. There is one value for each date.

> *select value from datatable where date = %%date%%*

Case 2 (most used): Indicator is updated monthly. There are several values for this period in the database that need to be summarized.

> *select sum(value) from datatable where date between %%UpdatePeriodStart%% and %%UpdatePeriodEnd%%*

Updating Data

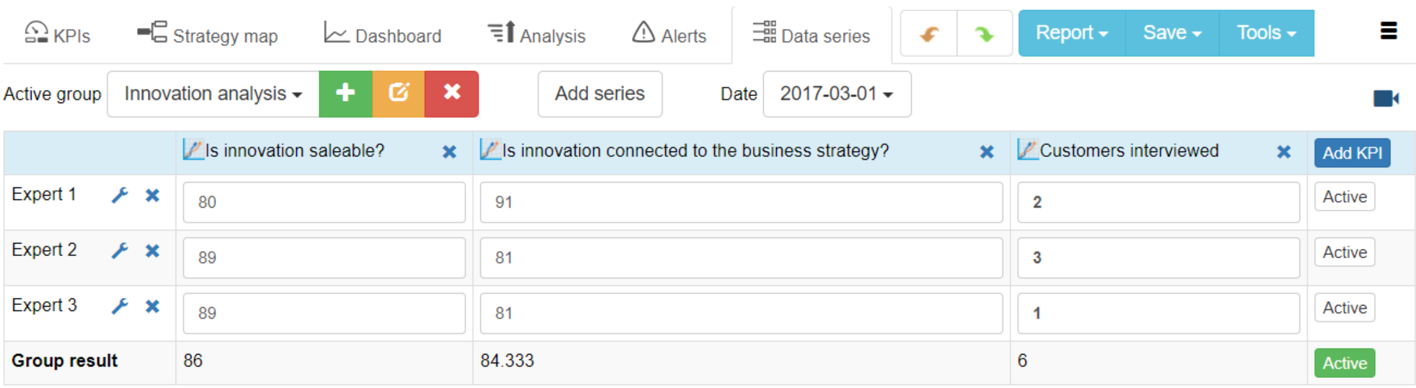
There are several ways to update data for SQL indicators:

- **Click on any date in the calendar** - BSC Designer will try to read data for that day; these requests are cached on the level of web browser session.
- **Manual update** - if you need to refresh data for certain date, use **Refresh imported** option in Tools menu
- **Specify update interval** - specify an update interval for an indicator. BSC Designer will update SQL indicator automatically using specified schedule.

Automate Expert Surveys with Data Series Function

Learn how to power indicators with data from surveys and expert interviews using Data Series function.

For example, it's hard to say if a proposed innovation idea is good enough, and how it compares to the alternatives. In those cases, a solution is to survey several experts and use the average of their opinions as an estimated value for the indicator. Data Series function in BSC Designer will help to keep track of such surveys.



Enable Data Series

To enable data series in BSC Designer Online:

1. Open any scorecard
2. Select indicator that you want to use in the data series
3. Select **Enable series** command in the **Tools** menu

A new tab **Data series** will appear.

Groups of Data Series

Data series can be organized into groups.

- By default there is just one group
- Use "+" button to add more groups

For example: use "Innovation analysis" as a group name.

Adding Evaluation Parameters

Survey questions or evaluation parameters are the indicators from a scorecard. Follow these steps to add a new indicator to the data series group:

1. Select required group in the **Active group** drop list
2. Click on **Add KPI** button (a blue button located on the right)
3. Select some of the indicators from your scorecard and click OK

A new indicator will appear as a new column name.

Adding Data Series

Data series can be the name of experts that will participate in the survey. To add a new data series:

1. Select required group in the **Active group** drop list
2. Click on **Add series** button
3. Enter a new series name (for example, expert's name)

A new data series will appear as a new row name.

Entering Data

Use the data series table to enter performance data.

1. Locate a required data series raw (a required expert name)
2. Locate a required KPI (a question that you ask the expert)
3. Enter the value into the cell (the value is an expert's opinion about the asked question)

Another way to enter data:

1. Make data series active (as described below)
2. Go to the KPIs tab and select appropriate indicator
3. Enter the data in this indicator

Go back to the Data Series tab to make sure that the data was entered properly.

Time Points are Supported

Indicators used in the Data Series are normal indicators of BSC Designer with all of their properties, including time points.

For example: It is possible to capture the survey results for different days and later analyze how the survey score was changing over time.

Calculating Group Results

The group results for all KPIs will be displayed in the last raw.

The data for the group results is calculated using the KPIs' values and their grouping type. You can use KPIs with different grouping type (e.g. average, sum, min, max).

Data Shown in the Value Field

The last column of the Data Series table contains several buttons with caption **Active**.

- The green button means that this data series is active
- The gray button means that the data series is not active

- To activate data series click on the corresponding gray button **Active**

The value for the **active** data series will be visualized:

- In the "value" field for the KPIs that were used in the data series
- In the performance reports

Automate KPIs Data Entry with RESTful API

Automate data reading and writing for KPIs with RESTful API. Automate access to your data for third party business tools.

General Information

- **Documentation.** The documentation for the API calls is available here.
- **Webhooks.** Alerts in BSC Designer can be configured to send out webhooks.
- **Limitations.** An account has a limit of 100 API calls per hour per power user.

Getting Started

Find below some instructions that will help to get started.

Authorization Token

API calls will require API key or a temporary authorization token.

To create a new API key follow these steps:

1. Go to the **Settings** section
2. Switch to the **Integrations** tab
3. Click on the **Add API Key** button

Use obtained **API key** parameter in the headers of all other calls to the API:

> *POST /rest/login HTTP/1.1*
>
> *Host: https://www.webbsc.com*
>
> *Content-Type: application/json*
>
> *Token: **replace_with_obtained_token***

Getting IDs for Scorecard and KPI

API calls related to the KPI require the ID of the scorecard and the GUID of the KPI.

Getting Scorecard ID

Scorecard ID can be found using API call or manually. To find Scorecard ID manually:

1. Go to the **My scorecards** section
2. Open the target scorecard
3. The URL of the scorecard will be something like this: https://www.webbsc.com/s/**123456**
4. The number at the end is the ID of the scorecard

Getting KPI GUID

KPI GUID can be found using API call or manually. To find GUID manually:

1. Open scorecard
2. Select **Tools** > **Export indicator values**
3. Follow the steps to get to the **Preview export results** page
4. **GUID** column in the preview table will contain the GUID of the KPI

Writing and Reading Value Using API

Use KPI Value Controller to write and read data for the KPIs.

- Remember to use **token** in the header of the requests
- Dates should be in the **yyyy-MM-dd** format (for example "2017-06-30")
- Data is sent and received in JSON format
- To optimize call numbers use batch calls
- To read grouped, calculated, or inherited values use Grouped Values Controller

Check out the php example of using API.

Create Professional Strategy Maps Automatically

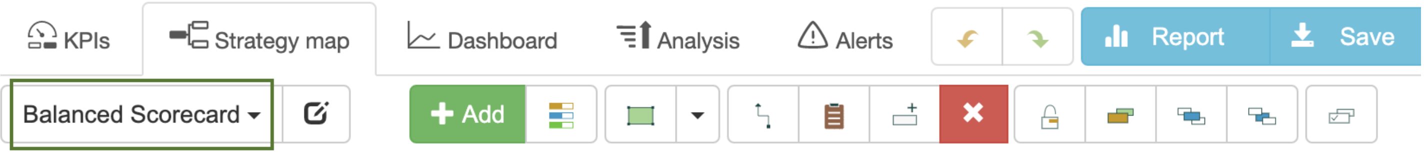
Create strategy maps using data from KPIs tab. Display perspectives, strategic themes, business goals, and KPIs.

For more information about strategy maps design, check out this article.

Manage Strategy Maps

To view or edit a strategy map you need to open an existing scorecard or create a new one, and then go to the **Strategy Map** tab.

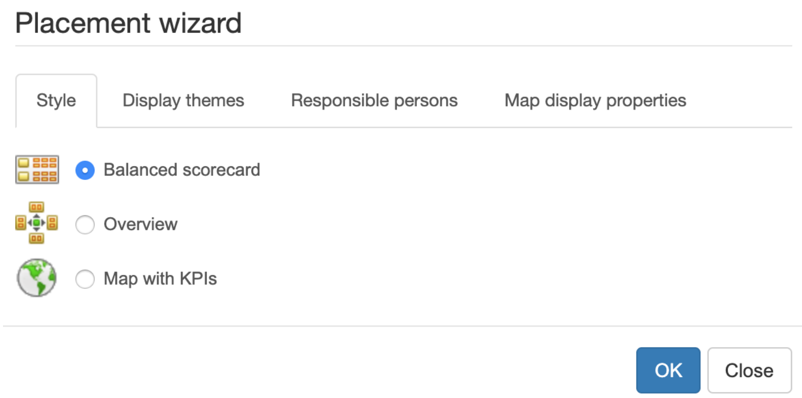
On the toolbar there is a drop list with all of the strategy maps available in your scorecard:



Generate Strategy Map Automatically

BSC Designer Online can generate a strategy map automatically using information about business goals, aligned KPIs, and cause-and-effect connections between them. To generate a map automatically, create a new map and click the **Strategy map placement** button:

BSC Designer will suggest for you to select a type of the map that you want to create, and will also allow you to customize map settings.



The interface of the map wizard is divided into several tabs.

Style

Select from several supported visualization styles

- **Balanced Scorecard** - a modern Balanced Scorecard strategy map with 4 perspectives, business goals, and cause-and-effect links between them
- **Overview** map - a rectangle-style map with top level KPIs/business goals only
- **Map with KPIs** - a geographical map where KPIs can be visualized

To use **Map with KPIs** map follow these steps:

1. Create a **Map with KPIs** using one of the predefined templates (* note, in BSC Designer PRO you can create more templates)
2. Go to the **KPIs** tab and select an indicator that you need to align with a region on the map
3. Select **Link item to the map** in the Tools
4. Go back to the **Strategy map** tab and update your **Map with KPIs**

Display Themes

A business goal in BSC Designer can belong to various strategic themes. On **Display themes** tab one can choose the themes that need to be visualized on the current map.

Owner

Choose if you want to show all goals, or goals/initiatives for the selected owners only.

Map Display Properties

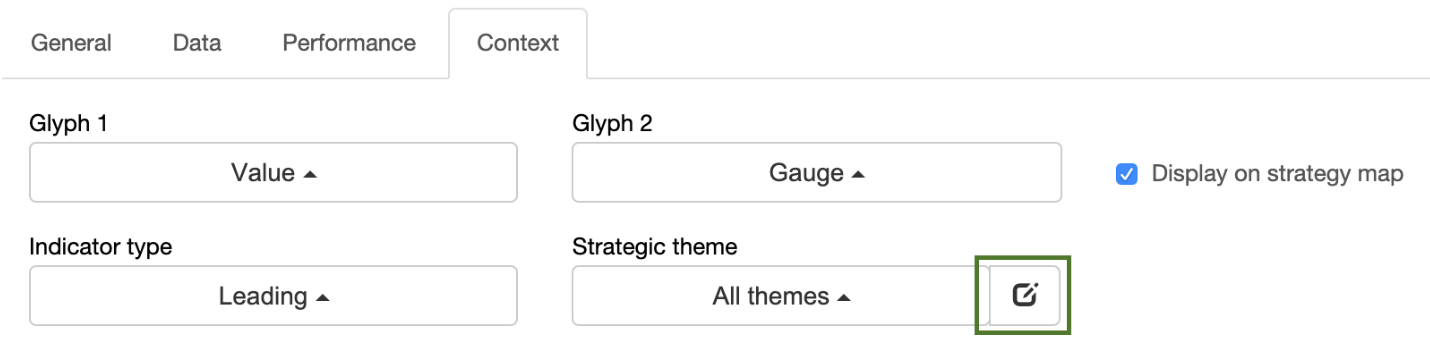
Various controls on this tab allow the user to customize the appearance of the business goals and aligned items on the strategy map.

Customize the Way Objects Look

BSC Designer uses certain color styles for business goals and KPIs. It is possible to adjust some color settings. Select any object on the strategy map and click **Formatting** button on the toolbar:

Once you finish editing make sure to click **Lock** button on the toolbar to let the software know that this object should not be changed when map will be rebuilt:

Another mean to customize the way how the business goals are displayed on strategy map is by customizing color scheme of the strategic themes. To do this go to the **KPIs** tab, select any business goal, go to the **Context** tab, find "Strategic theme" drop list, and click **Edit** button next to the drop list:



Drawing on the Strategy Map

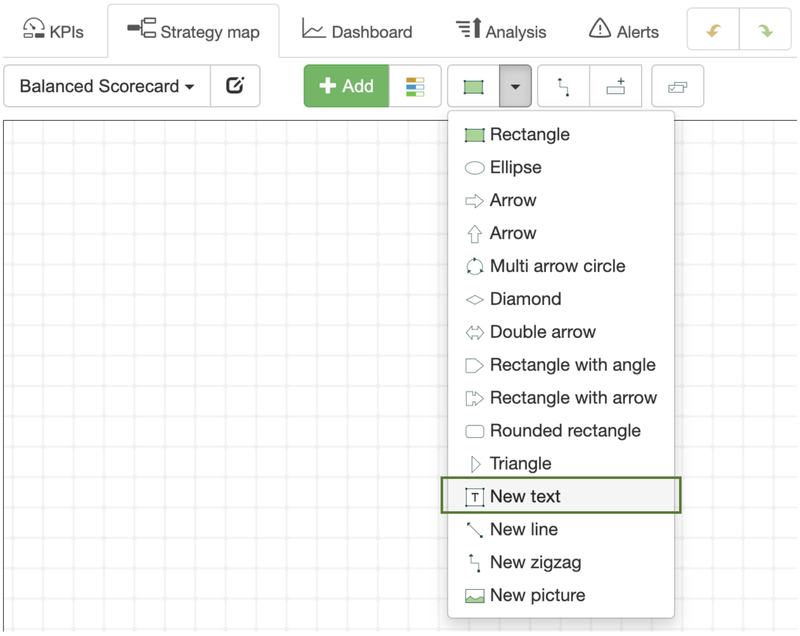
BSC Designer Online provides a wide range of objects that you can put on the map. Click on the **Custom objects** drop list to see what options you have:

Select an object from the list and click on the strategy map in a place where you want to place this new object.

- Double click onto the new object to enter some text.
- If you need to customize objects' settings such as color, gradient, etc. you need to select an object and click **Object properties** button.

Text on the Strategy Map

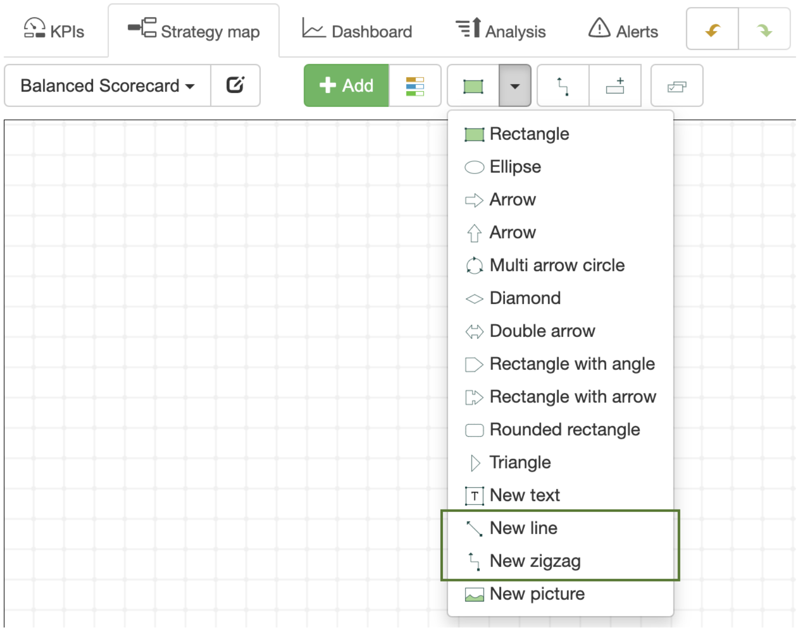
With the **Text** element you can put a text note anywhere on the strategy map.



To customize text properties such as font size and color, select an element and click the **Text Properties** button on the toolbar.

Links

You can link two objects using different link types. Select a link type that you need:



move a cursor over a source object, click and don't release a mouse button, move the cursor to the other object, select destination point and release the mouse button.

Send to Back, Bring to Front

Two buttons will help you to organize objects on the strategy map. Use them when you need to move some object to the front or bring it to the back.

Adding Items

You can add business objectives and KPIs to the strategy map.

To add a new goal or indicator:

1. Select a parent perspective or goal
2. Use **Add Item** button

To add an item that already exists:

- Use **Add Existing Item** button

Create Performance Dashboards for the Most Important KPIs

Display performance data on a dashboard in BSC Designer. Add new charts, create several dashboards, filter data that you need to see.

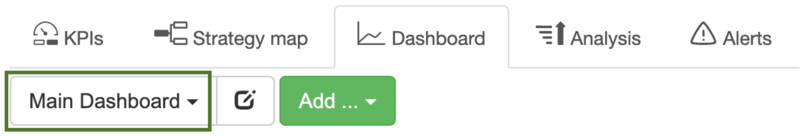
To access the dashboards follow these steps:

1. Log into your account at BSC Designer Online
2. Open any scorecard
3. Go to the **Dashboard** tab

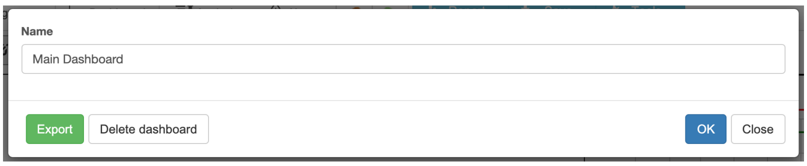
Creating a New Dashboard

Any scorecard in BSC Designer Online can include several performance dashboards. Using the toolbar on the **Dashboard** tab you can:

- Switch between dashboards available in the scorecard:



- Add new dashboards
- Add charts to the dashboards
- Rename existing dashboards
- Delete dashboards
- Export dashboard as a picture file



Adding a New Chart to a Dashboard

To add a new chart to a dashboard follow these steps:

1. Open any scorecard, go to the **Dashboard** tab
2. Click the **Add...** button on the toolbar
3. Choose an indicator that will be used as a source of the chart data
4. Select chart type from the drop list
5. Select if you want to visualize on the dashboard **Value**, **Performance**, or **Progress**
6. Click **OK** to finalize the process

Adjusting Chart Properties

In BSC Designer Online it is possible to move and resize charts according to your needs.

To delete a chart:

1. Hover over the chart

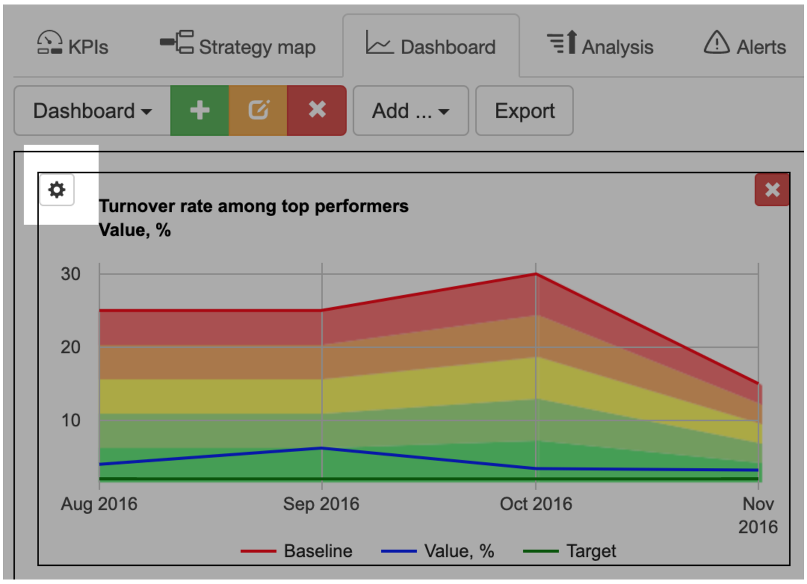
2. Click on the red cross icon that will appear

To resize a chart:

1. Move mouse pointer to the edge of the chart
2. Press mouse button, resize chart as needed
3. Release mouse button

Some charts (for example, a Time chart) can be customized additionally.

1. Move mouse pointer over the chart
2. Additional control will appear



3. Use "gear" button to customize chart, for example to change the period of time visualized on the chart

Dashboard Templates

If you plan to use the same layout of charts for different scorecards, then it's a good idea to create a dashboard template:

- Click **Edit dashboard properties** button
- Click **Save as template**

A new template will appear in the list of dashboards.

Existing dashboard templates can be managed on the ☰ > Settings > Workflow tab.

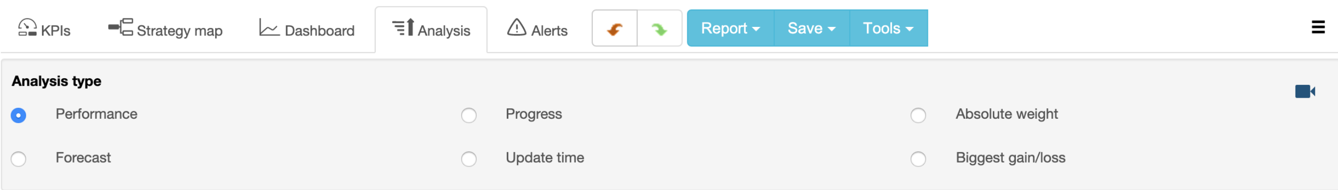
Performance Analysis and Forecast for KPIs

Find the best performing indicators, biggest gain or loss, predict indicator value, and detect indicators that were not updated on time.

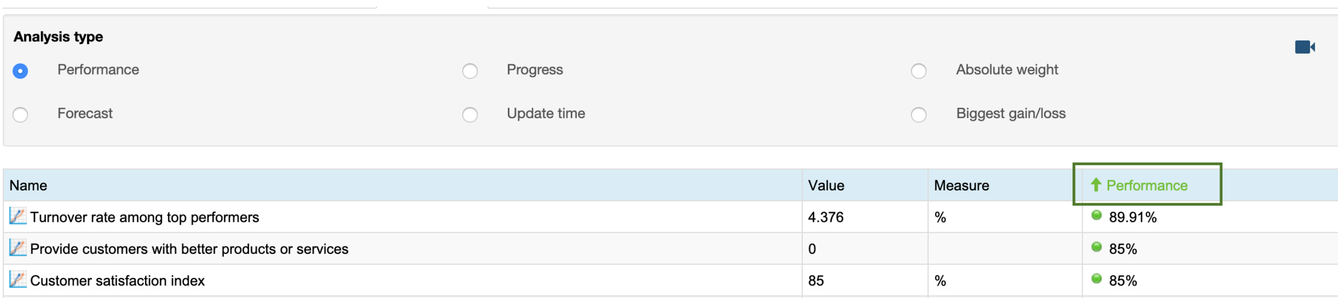
How-to use Analysis Function

Here is a general approach to using the analysis functions in BSC Designer Online:

1. Open a scorecard in BSC Designer Online and go to the **Analysis** tab
2. Choose the analysis type that you want to use:



3. In the list of indicators some columns will support order sorting, click on them to change sorting order:



4. Options below allow to adjust time interval for the analysis as well as other settings

Analysis Types

Here are the supported analysis types in BSC Designer Online:

- **Performance** - find best/worst performing indicators
- **Progress** - find indicators with highest/lowest progress
- **Absolute weight** - find indicators with the highest/lowest impact on the scorecard performance
- **Forecast** - do a linear forecast of indicator's value that is expected to be achieved for a certain date, or forecast a date when certain value will be achieved
- **Update time** - list indicators and their update dates, find indicators that were not updated on time
- **Biggest gain/loss** - find indicators that were the biggest gain/loss (can be applied to "value," "performance," "progress") over a period

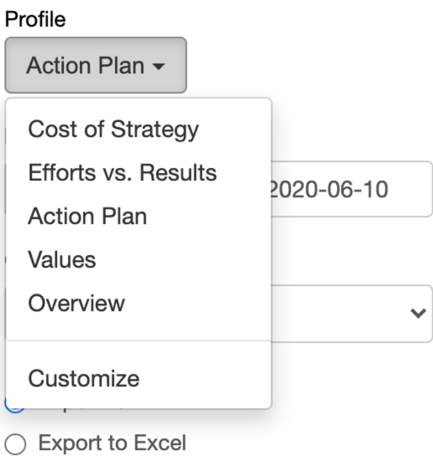
Performance Reports for KPIs, Goals, and Initiatives

Generate reports with various views on scorecard performance: overview, action plans, costs of strategy.

Generate a Report for the Scorecard

To generate a report please follow these steps:

1. Open a scorecard
2. Select **Report** menu
3. Select one of the options:

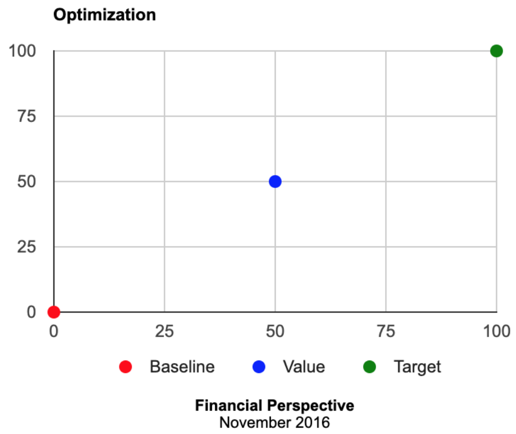


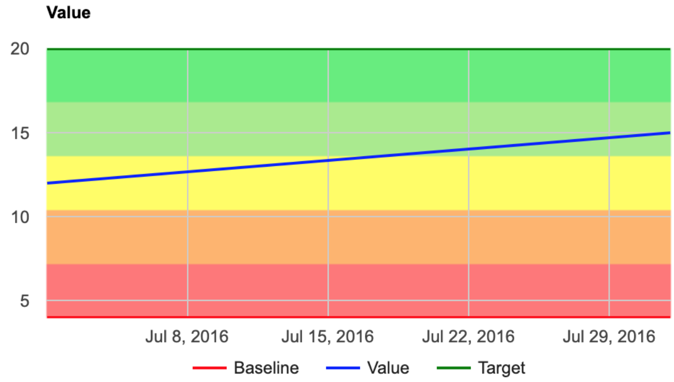
- **Cost of Strategy** - a summary of all initiatives with budget and duration data
- **Efforts vs. Results** - a report with data of the leading and lagging indicators
- **Action Plan** - a report with goals, initiatives, and persons responsible
- **Values** - a report with the values of all indicators from the scorecard
- **Overview** - a report with all the details about your KPIs and their performance
- **Customize** - use this option to create your own reports.

4. Follow the link to open a generated report.

Performance			Progress		
Min	Max	Average	Min	Max	Average
50%	68.75%	65%	50%	68.75%	65%

Graph for Financial Perspective



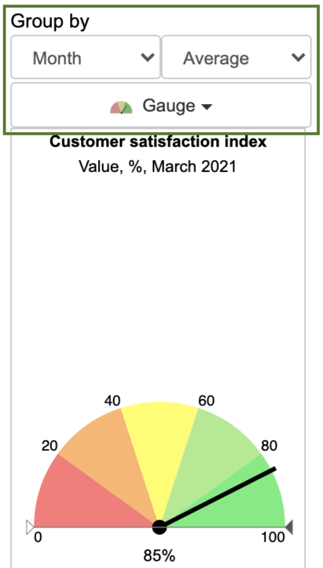


Any HTML report can be converted into an Adobe PDF document using any of free PDF printers available.

Charts in BSC Designer Online

To access charts and diagrams in BSC Designer Online open a scorecard, go to the KPIs tab and select any container or indicator. The chart element is displayed on the right.

Besides having a chart you have several drop lists.



- **Group by** has two drop lists that define information reporting interval (by day, by month, etc.) and summary type (average, sum, etc.)
- **Chart type** - select the chart that you want to display right now
- **Leading/lagging** - select to display leading or lagging part of the data (*available for containers only*)

Details about Charts and Diagrams

BSC Designer Online supports several types of chart.

- **Time chart.** The chart shows how the value of the KPI changes over time. On the chart, the baseline and target values are displayed as well.
- **Gauge diagram.** Displays the values of the KPI for the date selected in the calendar. The baseline and target values are displayed as well.
- **Optimization.** Refers to the formula that is used to calculate the performance.
- **Performance** and **Progress.** These charts show how the performance and progress value for the selected KPI are changing over a period of time.
- **Pie.** A Pie diagram is useful when you need to compare the performance of several KPIs in one container or in several top container.
- **Values.** Values table shows a date and respective KPI value for these dates.
- **Weight.** This chart shows the weights of all KPIs within a selected container.

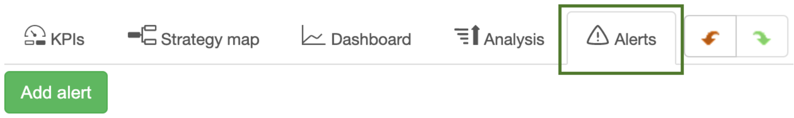
Setup Email Notifications and Webhooks for KPIs

Setup alerts and notifications to keep your team informed about important changes of KPIs. Use webhooks to integrate with third party systems.

Access Alerts in BSC Designer Online

To access alerts in BSC Designer Online:

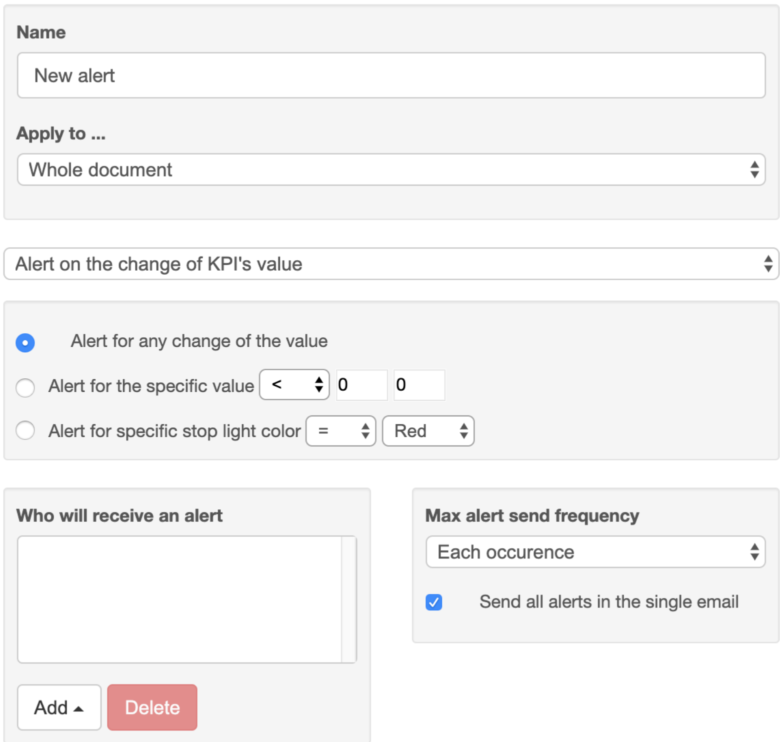
1. Open any scorecard
2. Go to the ⚠ **Alerts** tab



3. Click the **Add alert** button
4. Select required settings for an alert and click **OK**

Alert Settings

Change alert settings according to your needs:



- **Name** - a name for the new alert
- **Apply to...** - apply alert to the whole scorecard or only for some specific KPIs in your scorecard
- **Alert type** - decide what would be an event that will trigger an alert notification
- **Who will receive an alert** - click the **Add** button to select users that need to get this alert
- **Max alert send frequency** - define how often you want to get an alert

Webhooks

Alerts in BSC Designer can be configured to send out notifications as a webhook in JSON format.

To create a webhook URL:

1. Log into your account
2. Go to **Settings** > **Integrations**
3. Click **Add** to add Webhook URL

To use a webhook:

1. Open any scorecard
2. Go to the ⚠ **Alerts** tab
3. Create a new alert
4. Select the name of webhook for the **Who will receive an alert** option